

Mandi Amos

From: Mandi Amos
Sent: Thursday, February 22, 2018 8:17 AM
To: 'Morgan, William'
Subject: RE: shredding service

Billy,

Thanks for letting me know. When you come on the 28th, will you be able to empty containers, let us refill them and empty them again? Our containers have been full for over a week, so we have shred in boxes, and a shopping cart, and most anything sitting still that we can put shred in. We are in the process of converting paper files to electronic files, hence the blow up of shred. It won't take but a couple of minutes to refill the containers to be dumped again. We just have an abundance right now.

Mandi

From: Morgan, William [mailto:William.Morgan@STERICYCLE.com]
Sent: Wednesday, February 21, 2018 9:49 AM
To: Mandi Amos <mandi.amos@cherokeeconomy-nc.gov>
Subject: shredding service

Mandi, I received your request for an extra service. Unfortunatly we are only in that area every so often so we cannot make it before the 28th. As for the additional can being dropped off we can probably do just one because we are going to be servicing you in a shred truck and not a box truck. The shred trucks do not have room to haul multiple containers. I apologize for the inconvenience. But I will put a note on the 28th ticket for us to drop off an extra container to you.

Billy Morgan

Transportation Lead

O: [423.634.7196](tel:423.634.7196) | M: [423.504.3452](tel:423.504.3452) | Stericycle.com

3101 Williams St, Chattanooga, TN 37410

 **Stericycle**  **Shred-it** Shred-it® is a Stericycle solution.

Per phone call
Mandi to Kristen
Kristen

Ref = Top Priority

-Ref under 21333112-

Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Sent: Monday, June 11, 2018 4:51 PM
To: Kay Fields
Subject: FW: Quote and Spreadsheet
Attachments: CherokeeDSS-06-08-2018xlsx.xlsx; DSS-
EstimatedScanningQuote4153v1-06-11-2018.pdf

Does not include prep time. Removal of staples and paper clips.

From: Tim Kesler [mailto:Tim.Kesler@osdsinc.com]
Sent: Monday, June 11, 2018 4:25 PM
To: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Subject: Quote and Spreadsheet

Cathy,

Here you go. If you need more explanation let me know.

Regards...Tim
Tim Kesler | Senior Consultant

*We must adjust to changing times
and still hold to unchanging principles*
-J. Coleman

4355 Federal Drive, Suite 140
Greensboro, NC 27410
Office: 336-482-2360, ext 42
Mobile: 336-709-6052
www.osdsinc.com



For immediate support, please contact support@osdsinc.com

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Prepared For

Cherokee County DSS
Kay Fields
75 Peachtree St. 4800 W Hwy 64 Murphy, NC
28906
Murphy, NC 28906
kay.fields@cherokee-county-nc.gov
http://www.cherokee-county-nc.gov

Prepared By

Tim Kesler
4355 Federal Drive, Suite 140
Greensboro, NC 27410
Phone: 800-401-9544 x42
Email: tim.kesler@osdsinc.com




Scanning - 11x17 & Smaller	Qty	Price	Extended
Specifications: Documents are 11x17 or smaller, scanning in black and white, duplex, scanning at 300 dpi. Files will be taken to our Greensboro Office for processing and delivered in Laserfiche compatible format or PDF as required. Completed files can be returned, transferred to long-term storage or shredded upon completion and approval.			

Food Stamps and Medicaid

OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
OS-SC-BOXES	Estimated 381 Boxes (standard Bankers Box) Boxes and labels will be provided at no charge.	0	\$0.00	\$0.00

Document Preparation Services

OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00

Document Scanning Services

OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	200475	\$0.04	\$8,019.00
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Document Indexing Services

OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	1	\$0.005	\$0.005
OS-SC-DB	Document Indexing: Database Lookup	0	\$150.00	\$0.00

Adoptions

OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
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Document Preparation Services

Scanning - 11x17 & Smaller		Qty	Price	Extended
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00
<i>Document Scanning Services</i>				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	78540	\$0.04	\$3,141.60
<i>Document Indexing Services</i>				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	12950	\$0.005	\$64.75

<i>APS</i>				
OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
<i>Document Preparation Services</i>				
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00
<i>Document Scanning Services</i>				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	75900	\$0.04	\$3,036.00
<i>Document Indexing Services</i>				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	9250	\$0.005	\$46.25

<i>Day Care</i>				
OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
<i>Document Preparation Services</i>				
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00
<i>Document Scanning Services</i>				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	60720	\$0.04	\$2,428.80
<i>Document Indexing Services</i>				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	31200	\$0.005	\$156.00

Scanning - 11x17 & Smaller		Qty	Price	Extended
Adult Services				
OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
Document Preparation Services				
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00
Document Scanning Services				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	98670	\$0.04	\$3,946.80
Document Indexing Services				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	13858	\$0.005	\$69.29

Child Support (Purple Files)				
OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
Document Preparation Services				
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00
Document Scanning Services				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	81510	\$0.04	\$3,260.40
Document Indexing Services				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	49686	\$0.005	\$248.43

CPS				
OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00
Document Preparation Services				
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00
Document Scanning Services				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	481965	\$0.04	\$19,278.60

Scanning - 11x17 & Smaller		Qty	Price	Extended
Document Indexing Services				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	281799	\$0.005	\$1,408.995

Foster Care				
OS-SC-SETUP	Project Setup Service	1	\$250.00	\$250.00

Document Preparation Services				
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.) - Per Hour	5	\$18.00	\$90.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization) - Per Hour	5	\$18.00	\$90.00

Document Scanning Services				
OS-SC-500	Document Scanning: 11x17 or smaller (Over 500,000 Total Images)	196350	\$0.04	\$7,854.00

Document Indexing Services				
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	17500	\$0.005	\$87.50
NEW		1	\$0.00	\$0.00
Scanning - 11x17 & Smaller Subtotal				\$56,486.42

Transportation		Qty	Price	Extended
<i>Projects can be combined for pickup to reduce transportation expenses.</i>				
OS-FRT-MF	Scanning Freight - Mileage Fee (one way 282 miles)	282	\$1.75	\$493.50
OS-FRT-BX	Scanning Freight - Box Handling Fee (estimated 381 boxes)	381	\$1.00	\$381.00
Transportation Subtotal				\$874.50

Disposal/Storage		Qty	Price	Extended
<i>One Source will hold files in our active project warehouse for 90 days from the date of pick up. Once 90 days has been reached, the completed files will need to be either shredded or moved to our long-term storage facility or returned. If files are moved to long-term storage, there is an initial fee of \$70 plus an ongoing storage fee of \$15/pallet/month.</i>				
OS-SC-SHRED	Shredding Services - Per Box (standard size) TBD	0	\$5.50	\$0.00
OS-SC-STORAGE-P	Document Storage on Pallets at One Source Facility - Monthly Fee, if required	0	\$40.00	\$0.00
Disposal/Storage Subtotal				\$0.00



ONE SOURCE

DOCUMENT SOLUTIONS

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Main: 800-401-9544
Fax: 800-550-3676
Email: tim.kesler@osdsinc.com
Web: www.osdsinc.com

Professional Services		Qty	Price	Extended
		0	\$0.00	\$0.00
<i>Professional Services are estimated and may be adjusted as deemed necessary to complete the requested project at our normal rate of \$185.00/hour. After hours Professional Services are billed at \$250/hour.</i>				
Professional Services Subtotal				\$0.00

Processes & Services	Qty	Price	Extended
<p>Our Quality Control process starts from the moment the boxes are picked up at your site. We log, double check the inventory sheets provided and verify all records have been received. At each stage of the project, the next stage is double checking and verifying the work of the previous stage. A sample box is completed for approval at the onset of the project to determine accurate communication on project requirements.</p> <ol style="list-style-type: none"> 1. During the prepping stage, files are counted and verified to the log sheet provided with each box, dividers are inserted (if desired) and all operations required in preparing the files are completed, such as removing staples, flattening turned corners, removing or replacing sticky notes, etc. 2. During the scanning stage, technicians are charged with verification of scanning all pages within the file in the order they reside, at the best quality available at 300 dpi and stored in a Group IV tif format as required by the NC State Archives. All scanners are equipped with the latest image enhancement settings to assure high-quality scans and double-feed detection. 3. During the Quality Control stage, technicians are checking each image for readability, proper orientation, blank page removal and re-scanning with the powerful Kofax VRS software where necessary. 4. All files are then run through the post-processing stage for indexing (double key validation) and breaking documents into the required structure. 5. Upon completion the files are reviewed for accuracy, compared once again to the inventory control sheets assuring all files were scanned and divided as necessary. 6. Files are reviewed one more time for accuracy by the supervisor before exporting the files in the proper format for delivery via DVD or secure ftp. 7. All technicians working on the files initial and document the date and time they spent on each task. If a question arises, we review it with the appropriate personnel. 8. As deliveries are made, we verify that the delivery coincides with the data received for that pickup indicating box numbers, number of documents and images completed. 9. All paper files are kept in a secure warehouse adjoining the service bureau with limited access until they are moved to an off-site long-term storage facility or shredded. 10. Data is kept in our secure data center and backed up daily. Once a project is completed, the data is purged from our system. We do offer to keep a backup for our clients should that be desired. 11. If paper files in our warehouse are to be shredded and we receive written approval to do so, we have a certified shredding company come to our facility and we monitor the entire process, documenting that all documents/papers were properly disposed of. Upon completion of the on-site shredding, the truck returns to its plant where the shredded paper is run through an additional shredding operation. A certificate of disposal is provided to you upon completion. 12. Files that need extended storage are inventoried, palletized, shrink-wrapped, and transported to our partner's secure facility for the duration of storage cycle. 13. The only potential risks to the documents would be if a traffic accident occurred during the transportation of the files. All boxes will be taped with tamper-evident tape however prior to leaving your facility to add additional security to the boxes to assure they remain intact in case of a collision. 14. Document accessibility – One Source will provide 1-2 hour accessibility, depending on file size, to the emergency requests for the first 100 file pulls at no additional charge. We prep, scan and index files then upload to our ftp server for your access. We will email or phone a confirmation to the file requestor or IT. Files 101 & beyond will carry a service fee of \$25 per file. Fax requests will carry a service fee of \$10. Full accessibility to physical records in storage at One Source by designated personnel is available upon request. 			
Processes & Services Subtotal			\$0.00

Proposal Summary		Total Investment
Scanning - 11x17 & Smaller		\$56,486.42
Transportation		\$874.50
Disposal/Storage		\$0.00
Professional Services		\$0.00
Processes & Services		\$0.00
Total		\$57,360.92

Complete Your Order

To complete your order, please sign below then email or fax this document to us.

Signature _____ Date _____

Printed Name _____ PO # (if applicable) _____

Terms and Conditions:

Projects will be invoiced as document groups are delivered.
All prices exclude applicable taxes and freight.
Travel and Expenses for On-Site services will be billed separately.
The quoted prices are Valid for 60 Days.

Payment of amount due:

Scanning Services are billed incrementally based on actual number of images delivered. Balances invoiced on delivery, net due upon receipt.

We accept Master Card, VISA and American Express. Amounts above \$5,000 paid by credit card may be subject to a 2.5% transaction fee.

Thank you for your order. Your electronic signature, per the Electronic Signature Act, is considered equivalent to your signed and faxed signature, and allows you to accept and place your order. A copy of this acceptance and the attached quote or proposal document will be sent to your email address to complete your order acceptance. If you have any questions, please feel free to contact us. ALL SALES ARE FINAL.

Cherokee DSS

Food Stamps and Medicaid

Lateral Files
45" Lateral Files

70 Files per Shelf
Index = Name Only

Lateral Shelves	Depth in Inches	Total Inches
27 ft Files 70	45 in Files Total 1890	1,215 FN, LN Characters 25

Adoptions

Lateral Files
34" Lateral Files

37 Files per Shelf
Index = Adoptive Name Only

Lateral Shelves	Depth in Inches	Total Inches
14 Files 37	34 Files Total 518	476 FN, LN Characters 25

APS

Lateral Files
46" Lateral Files

37 Files per Shelf
Index
FN, LN

Screen Outs (drop down yes or no)

Lateral Shelves	Depth in Inches	Total Inches
10 Files 37	46 Files Total 370	460 FN, LN Characters 25

Day Care

Lateral Files
46" Lateral Files

Lateral Shelves	Depth in Inches	Total Inches
8 Files 156	46 Files Total 1248	368 FN, LN Characters 25

156 Files per Shelf
Index
FN, LN

Transportation
Lateral Files
46" Lateral Files

123 Files per Shelf
Index
FN, LN

Adult Services
Lateral Files
46" Lateral Files

41 Files per Shelf
Index
FN, LN
Drop Down
Rep Pay
SA
Guardianship
In Home

Child Support (Purple Files)
Lateral Files
38" Lateral Files

Lateral Shelves	Depth in Inches	Total Inches
8	46	368
Files	Files Total	FN, LN Characters
123	984	25

Lateral Shelves	Depth in Inches	Total Inches
13	46	598
Files	Files Total	FN, LN Characters
41	533	26

Lateral Shelves	Depth in Inches	Total Inches
13	38	494
Files	Files Total	FN, LN Characters
147	1911	26

147 Files per Shelf
Index
FN, LN

CPS

Lateral Files

46" Lateral Files

31" Lateral Files

Lateral Shelves	Depth in Inches	Total Inches
48	46	2,208
23	31	713
Files	Files Total	FN, LN Characters
147	10437	27

147 Files per Shelf
Index

Parents Name

Drop Down = Type

Live

Screen Out

Drop Down = Closed

Yes

No

Foster Care

Lateral Files

34" Lateral Files

Lateral Shelves	Depth in Inches	Total Inches
35	34	1,190
Files	Files Total	FN, LN Characters
20	700	25

20 Files per Shelf
Index (Child's Name)
FN, LN

Per Inch	Estimated Pages	Doubled Side
150	182,250	10%
47,250		200,475

Per Inch	Estimated Pages	Doubled Side
150	71,400	10%
Total Char		78,540

Per Inch	Estimated Pages	Doubled Side
150	69,000	10%
Total Char		75,900

Per Inch	Estimated Pages	Doubled Side
150	55,200	10%
Total Char		60,720

Per Inch	Estimated Pages	Doubled Side
150	55,200	1030%
Total Char		60,720
24,600		

Per Inch	Estimated Pages	Doubled Side
150	89,700	10%
Total Char		98,670
13,858		

Per Inch	Estimated Pages	Doubled Side
150	74,100	10%
Total Char		81,510
49,686		

Per Inch	Estimated Pages	Doubled Side
150	331,200	10%
150	106,950	10%
Total Char		
281,799		
	364,320	
	117,645	

Per Inch	Estimated Pages	Doubled Side
150	178,500	10%
Total Char		
17,500		
	196,350	

1,334,850

Amanda McGee

From: Kay Fields <kay.fields@cherokeecounty-nc.gov>
Sent: Tuesday, June 12, 2018 2:57 PM
To: Cathy Hurt
Subject: FW: RECORD RETENTION

Importance: High

For your information.

From: Renee McLean
Sent: Tuesday, June 12, 2018 11:06 AM
To: Fields, Patricia G <Patricia.Fields@dhhs.nc.gov>
Cc: Kay Fields <kay.fields@cherokeecounty-nc.gov>
Subject: RECORD RETENTION
Importance: High

TRISH,

WE ARE WORKING TO SCAN ALL INFORMATION IN OUR FILE ROOM AND DESTROY OLD REPORTS, AS ALLOWED. CAN YOU ADVISE THE RETENTION ON NOTICE REGISTER REPORTS AND CASEWORKER SUPERVISOR REPORTS? IF YOU ARE UNABLE TO ADVISE, DO YOU HAVE A SUGGESTION OF WHO WE COULD CONTACT? THIS IS OF UPMOST IMPORTANCE DUE TO NEEDING EXTRA SPACE FOR OFFICES IN OUR COUNTY.

THANK YOU FOR YOUR HELP!

Renee' B. McLean
Cherokee County Department of Social Service
Universal Supervisor II
4800 W. Hwy 64
Murphy, NC 28906
Phone (828)837-7455 ext 240
Fax (828)837-9789

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Amanda McGee

From: Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Sent: Tuesday, June 12, 2018 3:23 PM
To: Cathy Hurt
Subject: FW: [External] Retention Schedule For Day Sheets

Per our discussion.

From: Black, Wayne E [mailto:Wayne.Black@dhhs.nc.gov]
Sent: Tuesday, June 12, 2018 3:05 PM
To: Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Cc: Black, Wayne E <Wayne.Black@dhhs.nc.gov>
Subject: FW: [External] Retention Schedule For Day Sheets

Forwarding the information below. Thanks! WB

Wayne E. Black
Director
Division of Social Services
NC Department of Health and Human Services

Office: 919-527-6336
Fax: 919-334-1018
wayne.black@dhhs.nc.gov

820 S. Boylan Ave., McBryde Building
2401 Mail Service Center
Raleigh, NC 27699-2401

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From: Dixon, Carlotta
Sent: Tuesday, June 12, 2018 3:01 PM
To: Black, Wayne E <Wayne.Black@dhhs.nc.gov>; Stegenga, Richard A <Richard.Stegenga@dhhs.nc.gov>; Sommese, Kathy <kathy.sommese@dhhs.nc.gov>
Cc: Lawrence, Steven B <Steven.Lawrence@dhhs.nc.gov>
Subject: RE: [External] Retention Schedule For Day Sheets
Importance: High

Hi,
The new Record Retention Officer is Steven Billy Lawrence.
I am copying him on this email.

In the meantime, below is the link and a print screen of where to find the record retention for Day Sheets within the County Social Services Record Retention Manual, pages 57 & 59.

https://files.nc.gov/dncr-archives/documents/files/county_social_services_20160928.pdf

Thanks Carlotta

STANDARD & PROGRAM OPERATIONAL RECORDS: SOCIAL SERVICES ADMINISTRATION			
ITEM #	RECORD SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.	UNRECORDED BODY CASE RECORDS Includes disposition forms, manifestation records, and other related records.	Records may be destroyed on a fixed year basis when the office is notified by Department of Health and Human Services - Office of the Controller that specific records are released from all audits, reports, or other official actions. ¹	Authority: G.S. § 150A-415(c)
7.	WORKER DAILY REPORT OF SERVICES TO CLIENTS (EMP SHEET) Forms concerning employees' activities used to determine appropriate program charges.	Records may be destroyed on a fixed year basis when the office is notified by Department of Health and Human Services - Office of the Controller that specific records are released from all audits, reports, or other official actions. ¹	Confidentiality: G.S. § 150A-40
8.	WORKER DAILY TRANSPORTATION SCHEDULES Schedules used by department drivers for transportation related to all programs.	Records may be destroyed on a fixed year basis when the office is notified by Department of Health and Human Services - Office of the Controller that specific records are released from all audits, reports, or other official actions. ¹	Confidentiality: G.S. § 150A-40
9.	YOUTH EMPLOYMENT CERTIFICATE RECORDS Records concerning issuance of youth employment certificates. Includes waiver.	Destroy in office nonconfidential records issued by this agency when individual reaches 20 years of age.	Authority: G.S. § 95-21.5

¹No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See ACTIONS, LITIGATION, AND OTHER OFFICIAL ACTIONS, page 10.

²See signature page. The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Historical and Cultural Resources has submitted with the disposition instructions. "History when reference notes apply." Please use the space provided.

³Records may be destroyed only after office is notified by Department of Health and Human Services - Office of the Controller that the records are released from all audits, reports, or other official actions. Transfer records involved in litigation to LITIGATION CASE RECORDS, page 35, item 12.

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NC

STANDARD & PROGRAM OPERATIONAL RECORDS: SOCIAL SERVICES

Official records concerning youth services programs administered by county social services agencies.

Records are retained only after the agency is notified by the Department of Health and Human Services - Office of the Controller that the records are released from all audits, reports, or other official actions. Transfer records involved in litigation to LITIGATION CASE RECORDS, page 35, item 12.

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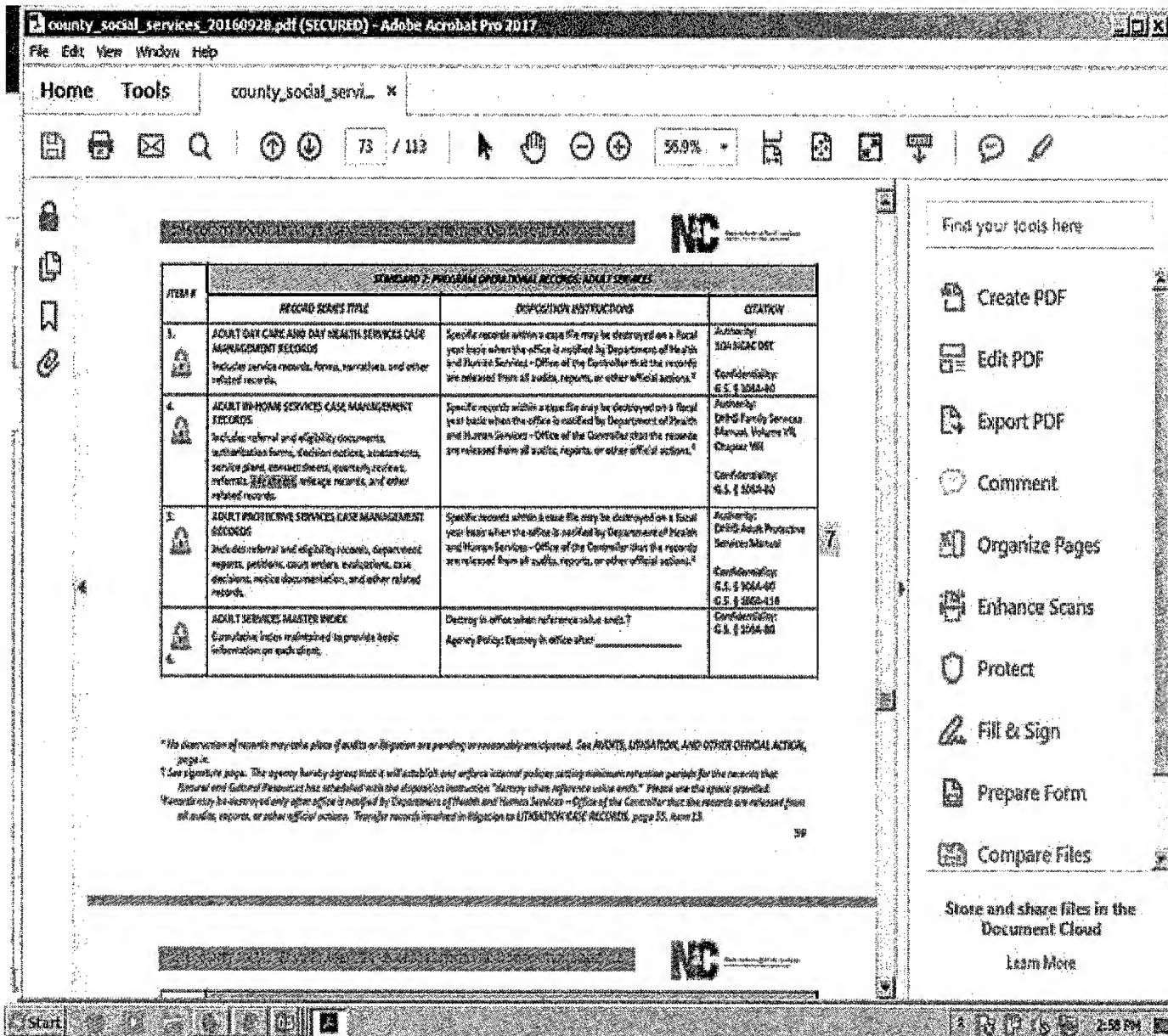
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From: Black, Wayne E
Sent: Tuesday, June 12, 2018 2:20 PM
To: Stegenga, Richard A <Richard.Stegenga@dhhs.nc.gov>; Dixon, Carlotta <carlotta.dixon@dhhs.nc.gov>; karhy.sommese@dhhs.nc.gov; Black, Wayne E <Wayne.Black@dhhs.nc.gov>
Subject: Fwd: [External] Retention Schedule For Day Sheets

Does one of you have this? Thanks! WB

Sent from my iPhone

Begin forwarded message:

Resent-From: <SRS0=6Oeb=I6=cherokeecounty-nc.gov=kay.fields@securance.com>
From: Kay Fields <kay.fields@cherokeecounty-nc.gov>
Date: June 12, 2018 at 1:55:02 PM EDT
To: "Black, Wayne E" <Wayne.Black@dhhs.nc.gov>
Subject: [External] Retention Schedule For Day Sheets

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Have you had a chance to find out who I need to contact to find out the retention schedule for day sheets?

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Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Sent: Thursday, June 21, 2018 12:50 PM
To: Kay Fields
Subject: draft

Dear Randy,

As we discussed on Wed the dire need for office space at DSS, and how we might be able to utilize the space in the file room as our best options. In order to achieve that we need to have ONE SOURCE a scanning company provide that service. We are currently verifying Retention date on all programs in order to purge all unnecessary scanning. we know we can reduce the scanning costs, for family and childrens Medicaid, food and nutrition, child support , Medicaid Transportation, Adult Services, as we have aggressively gone through most of the files that need to be purged. Unfortunately we are at a stand still with our shredding space as CINTAS the company who provides this service was unable to come this week. We will set up a PURGE day appointment with them in order to rectify this problem. As we stated to you we are committed to purging files before they are sent to be scanned in order to offset any unnecessary costs.

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Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Sent: Thursday, June 21, 2018 2:01 PM
To: Randy Wiggins
Cc: Kay Fields
Subject: FW: Scanning Costs
Attachments: Scanning Costs.pdf

From: Cathy Hurt
Sent: Thursday, June 21, 2018 1:59 PM
To: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Subject: Scanning Costs

Dear Randy,

Per our conversation on Wednesday reference the scanning costs of the closed files located in the DSS File Room. We have received estimates from One Source for each program to be scanned. In order to cut those costs, we have begun purging Family and Children's Medicaid, and Food and Nutrition. We have completed purging all closed Child Support Cases. Medicaid Transportation and Adult Services will be purged next. Unfortunately we had to stop our purging process due to all of the Shredding Bins were full. We used all available boxes to fill and they are now in the isles waiting for SHREDIT to come and shred. Due to their delay we are unable to proceed. This issue is being addressed. When that situation is handled we will continue to go through all programs that can be purged according to their retention dates in order to make sure that no unnecessary scanning costs will be applied to the county. See attached for ONE SOURCE estimates and how those estimates were determined.

Thank you,

Cathy Hurt and Kay Fields

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Amanda McGee

From: Tania Firebaugh <vania.firebaugh@cherokeeconomy-nc.gov>
Sent: Wednesday, June 27, 2018 8:42 AM
To: Randy Wiggins; Kay Fields
Cc: Candy R. Anderson
Subject: RE: Scanning Contract

We do have a contract with Shred It and the contract does spell out pick up frequency.

*Tania Firebaugh, CLGPO
Cherokee County, NC
Accounting/Purchasing Officer*

From: Randy Wiggins
Sent: Wednesday, June 27, 2018 8:03 AM
To: Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Cc: Tania Firebaugh <vania.firebaugh@cherokeeconomy-nc.gov>
Subject: RE: Scanning Contract

I do believe the County has a contract. I have copied Tania who can confirm.

Randy Wiggins
County Manager
75 Peachtree Street
Murphy, NC 28906
Office: 828-837-5527 x.815
Fax: 828-837-9684
Cell: 828-361-2501
randy.wiggins@cherokeeconomy-nc.gov

From: Kay Fields
Sent: Wednesday, June 27, 2018 7:15 AM
To: Randy Wiggins <randy.wiggins@cherokeeconomy-nc.gov>
Subject: Scanning Contract

Cathy and I have scheduled conference call with One Source at 10 this morning to discuss scanning contract. I will give you update after call.

It is my understanding that dss does not have contract with provider that does the shredding. Does the county have a contract? Should dss have a contract? Perhaps a contract would better spell out timelines and responsibilities. Please advise.

Have a good day.

Amanda McGee

From: Tania Firebaugh <vania.firebaugh@cherokeeconomy-nc.gov>
Sent: Wednesday, June 27, 2018 9:25 AM
To: Kay Fields
Subject: FW: Shred It
Attachments: DOC062118-06212018103312.pdf

Attached is a copy of the contract that Cindy sent last week. We are working with Shred It to update the contract since pick up frequency has been increased but this will not happen before July. Let me know if you need anything else.

*Tania Firebaugh, CLGPO
Cherokee County, NC
Accounting/Purchasing Officer*

From: Randy Wiggins
Sent: Thursday, June 21, 2018 2:11 PM
To: Cindy Palmer <cindy.palmer@cherokeeconomy-nc.gov>
Cc: Candy R. Anderson <candy.anderson@cherokeeconomy-nc.gov>; Tania Firebaugh <vania.firebaugh@cherokeeconomy-nc.gov>
Subject: FW: Shred It

Thank you Cindy. I have copied Candy and Tania in the event they can possibly get more traction out of them to respond.

Randy Wiggins
County Manager
75 Peachtree Street
Murphy, NC 28906
Office: 828-837-5527 x.815
Fax: 828-837-9684
Cell: 828-361-2501
randy.wiggins@cherokeeconomy-nc.gov

From: Cindy Palmer
Sent: Thursday, June 21, 2018 12:04 PM
To: Randy Wiggins <randy.wiggins@cherokeeconomy-nc.gov>
Subject: Shred It

The contact information I have for Shred It is 423-634-7196. That goes to a central number, not the office that services our area. We have had several calls to them in the last few months requesting more frequent service, including the following service call numbers (21241731, 21333112, 158930, 170586). Since February we have requested to get serviced every 2 weeks. That hasn't happened yet.

The attachment is the original agreement and an email communication Mandi had with someone from the local office in February.

We were scheduled for a pickup yesterday- June 20th and they had a "scheduling conflict" and just changed it to Monday June 25th. I contacted 'sales' to see about getting a 'purge'- which is when they will come pick up more than 10 boxes. They would have to know how many bins we would have and give us a quote.

The last person I talked to (in sales) was going to contact the Chattanooga office to find out what was going on/the problem and she said she would personally call me back. That was early this morning.

Cindy R. Palmer

Business Officer

Cherokee County DSS

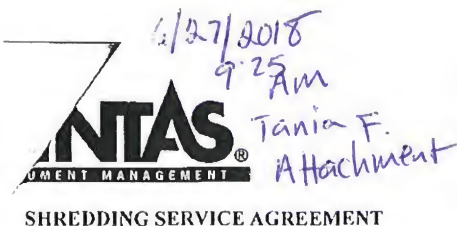
4800 W US Highway 64

Murphy NC 28906

828-837-7455 ext 202

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Cintas Document Management
3101 Williams St
Chattanooga, TN 37410
Phone 423-634-7196
Fax 423-634-8974

Document Management Policy #DM-2005
Exhibit A

New _____ Renewal X
Location No D02
Contract No _____
Customer No 1727

Date 11/27/2012
Phone 828-837-7455

Customer Cherokee Co. Dept of Soc. Serv
Address 4800 W US Hwy 64 City Murphy State NC Zip 28906

The customer, its successors and assigns ("Customer") orders from Cintas Corporation No. 2 dba Cintas Document Management or any of its subsidiaries, successors and assigns ("Company") all of the Customer's shredding service requirements during the term of this agreement, all in accordance with the pricing, terms and conditions contained herein.

ITEMS FURNISHED BY THE COMPANY:

First Container

Collection "C" or Dock Stop "D" Service	Description	Service Frequency	Quantity	Unit Price	Replacement Value
<u>C</u>	<u>44 Gallon container</u>	<u>ELW</u>	<u>3</u>	<u>35.00</u> <u>1st container</u>	

Additional Services

Collection "C" or Dock Stop "D" Service	Description	Service Frequency	Quantity	Unit Price	Replacement Value
				<u>15.00</u> <u>each addtl</u>	

Minimum Charge is _____ Per Stop
Service Charge is 8.00 Per Stop

The Service Charge is used to help Company pay various fluctuating current and future costs including, but not limited to, costs directly or indirectly related to the environment, energy issues, service and delivery of goods and services, in addition to other miscellaneous costs incurred or that may be incurred in the future by Company.

Company will provide containers and collection or dock stop shredding of all customer's confidential information as herein provided. "Confidential Information" means any information relating to the Customer's property, business and affairs. Unless such Confidential Information was previously known to Company free of any obligation to keep it confidential, is subsequently made public by Customer or by a third party having a legal right to make such disclosure, or was known to Company prior to receipt of same from Customer, it shall be held in confidence by Company and shall be used only for the purpose provided in this Agreement.

This agreement is effective as of the date of the first invoice and shall remain in effect for sixty (60) months from the date of first invoice. This Agreement shall automatically renew for the same period of time unless the Company is notified, to the contrary, in writing sixty (60) days in advance of the expiration of the then current term. Price listed above is based on the number of containers quoted and frequency of service. Company has the right to increase prices and/or service charges and/or minimum charges. Such notice may be in the form of invoice. The Customer has the right to reject these increases. If Customer rejects the increase, Company has the right to terminate this Agreement.

Company guarantees to deliver the highest quality shredding service at all times. Any complaints about the quality of service which have not been resolved in the normal course of business must be sent by registered letter to the Company's General Manager. If the Company then fails to resolve any material complaint in a reasonable period of time, Customer may terminate this Agreement provided all containers are paid for at the then current replacement values or returned to the Company in good and usable condition.

Additional containers and services can be added to this Agreement and shall automatically be a part of and subject to the terms hereof. If this Agreement is terminated early, the parties agree that the damages sustained by Company will be substantial and hard to ascertain. Therefore, if this Agreement is terminated by Customer prior to the applicable expiration date for any reason other than for documented quality of service reasons which are not cured as set forth above, or terminated by Company for cause at any time, Customer will pay to Company, as liquidated damages and not as a penalty, 50% of the average invoice total multiplied by the number of invoices remaining in the unexpired term. Customer shall also be responsible for any unpaid charges on Customer's account prior to termination, up to and including the charges for servicing the Customer on the last pick-up. Any dispute or matter arising in connection with or relating to this agreement shall be resolved by binding and final arbitration under both the laws of the state where Customer is located and applicable federal laws providing for the enforcement of agreements to arbitrate disputes. Arbitration shall be administered by a single arbitrator selected by agreement of the parties. Any dispute arising under this agreement shall be determined on an individual basis, shall be considered unique as to its facts, and shall not be consolidated in any arbitration or other proceeding with any claim or controversy of any other party. The exclusive jurisdiction and forum for resolution of any such dispute shall lie in the state where Customer is located. This agreement and any arbitration resulting therefrom shall be exclusively governed by the laws of the state where the Customer is located and applicable federal laws.

All containers and cabinets remain the property of Company. The Customer agrees to use said containers and cabinets solely for disposal of confidential material. In the event that the containers and cabinets are lost, damaged or destroyed by any means, the Customer will pay for said containers and cabinets at the then current replacement values.

The Customer certifies that the Company is in no way infringing upon any existing contract between the Customer and another service provider.

Terms of Payment: 10th E.O.M.

Accepted by: _____
Title: _____
Approved by: _____

Customer: Cherokee County D.S.S.
By: Cindy Palmer
Please Print: Cindy Palmer
Name & Title: Business Officer E-mail: cindy.palmer@cherokee-county-nc.gov

☐ Check if Business Associate Agreement Required

☐ Check if Sub Contracting needed

Amanda McGee

From: Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Sent: Wednesday, June 27, 2018 8:45 AM
To: Tania Firebaugh
Subject: RE: Scanning Contract

Would you mind sending me a copy?

From: Tania Firebaugh
Sent: Wednesday, June 27, 2018 8:42 AM
To: Randy Wiggins <randy.wiggins@cherokeeconomy-nc.gov>; Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Cc: Candy R. Anderson <candy.anderson@cherokeeconomy-nc.gov>
Subject: RE: Scanning Contract

We do have a contract with Shred It and the contract does spell out pick up frequency.

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Cherokee County, NC
Accounting/Purchasing Officer*

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It is my understanding that dss does not have contract with provider that does the shredding. Does the county have a contract? Should dss have a contract? Perhaps a contract would better spell out timelines and responsibilities. Please advise.

Have a good day.

Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Sent: Thursday, July 05, 2018 9:00 AM
To: Randy Wiggins; Candy R. Anderson
Cc: Kay Fields; Cindy Palmer
Subject: FW: Contract for Services
Attachments: CherokeeDSS_ScanningContract_v1.0_7-3-2018.doc

Good morning Randy,

Here is the contract from One Source to scan Family Children's Medicaid, Food and Nutrition, Adult Medicaid and Child Support. We have completed the purge process for all those programs and are ready to have those documents shredded. Upon approval of this contract we will begin the process of packing all files to be scanned by One Source. Let me know if you have any questions.

Thank you,
Cathy Hurt

From: Kevin Smith [mailto:Kevin.Smith@osdsinc.com]
Sent: Tuesday, July 03, 2018 5:14 PM
To: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Cc: Tim Kesler <Tim.Kesler@osdsinc.com>
Subject: Contract for Services

Cathy,

Please find attached a draft of the Contract for Services for you to review. I am sending the MS Word version to make editing easier and have enabled track changes so that you can edit and I can review.

If this is not the type of agreement you had in mind, please call me Thursday, or email me and we can collaborate.

Have a safe and enjoyable Independence Day!

Sincerely,

Kevin Smith | President & CEO
One Source Document Solutions, Inc.
4355 Federal Drive, Suite 140
Greensboro, NC 27410
336-482-2360 ext. 67

*At One Source our purpose is to help our clients improve productivity through innovative technology,
empower our employees to reach their full potential,
and enrich our community by partnering with local charities and organizations.*

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Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Sent: Thursday, July 05, 2018 11:00 AM
To: Randy Wiggins; Candy R. Anderson
Cc: Kay Fields; Cindy Palmer
Subject: FW: Scanning Services Contract
Attachments: Contract - Scanning Services - Expires 6-30-19.pdf

Looks like we are a GO!
Thanks everyone.
Cathy

From: Kevin Smith [mailto:Kevin.Smith@osdsinc.com]
Sent: Thursday, July 05, 2018 10:19 AM
To: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Subject: RE: Scanning Services Contract

Cathy,

Thanks for sending this over. We look forward to working with you on this project.

Attached is the fully executed agreement.

Have a great day!

Kevin Smith | President & CEO
One Source Document Solutions, Inc.

336-482-2360 ext. 67

From: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Sent: Thursday, July 5, 2018 9:58 AM
To: Kevin Smith <Kevin.Smith@osdsinc.com>
Subject: FW:

Good Morning Kevin,
Here is our contract signed and ready for your signature. We will be mailing today the Sample Box to Ashley.
Thank you,
Cathy

From: Cathy Hurt
Sent: Thursday, July 05, 2018 9:56 AM
To: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Subject:

Kevin Smith email
7/3/18 5:44 PM
Contract Attachment

SERVICE AGREEMENT – Scanning Services

This Contract for Services is made effective as of July 1, 2018, by and between Cherokee County DSS ("Client") of 4800 W U.S. Highway 64, Murphy, North Carolina 28906, and One Source Document Solutions, Inc. ("OSDS") of 4355 Federal Drive, Suite 140, Greensboro, North Carolina 27410.

1. DESCRIPTION OF SERVICES. Beginning on July 1, 2018, OSDS will provide to Client the following services (collectively, the "Services"):

Digitization of paper records at 300dpi, indexed according to the specifications provided by the Client. All scanning will take place at the OSDS main office in Greensboro, NC. Rates and procedures are detailed on Attachment A and B.

2. PAYMENT. Payment shall be made to One Source Document Solutions, Inc., PO Box 8227, Greensboro, North Carolina 27419. Client agrees to pay the sum of \$12,000.00 as follows:

Event and Payment Amount

Delivery of Completed Data – amount due will vary depending on quantity of data in each delivery, not to exceed a total of \$12,000.00.

If any invoice is not paid when due, interest will be added to and payable on all overdue amounts at 12 percent per year, or the maximum percentage allowed under applicable North Carolina laws, whichever is less.

Client shall pay all costs of collection, including without limitation, reasonable attorney fees. In addition to any other right or remedy provided by law, if Client fails to pay for the Services when due, OSDS has the option to treat such failure to pay as a material breach of this Contract and may cancel this Contract and/or seek legal remedies.

3. TERM. This Contract will remain in effect for a period of 12 months from the effective date. This contract may be renewed for two (2) additional one (1) year periods at the option of the County.

4. CONFIDENTIALITY. OSDS, and its employees, agents, or representatives will not at any time or in any manner, either directly or indirectly, use for the personal benefit of OSDS, or divulge, disclose, or communicate in any manner, any information that is proprietary to Client. OSDS and its employees, agents, and representatives will protect such information and treat it as strictly confidential. This provision will continue to be effective after the termination of this Contract. Any oral or written waiver by Client of these confidentiality obligations which allows OSDS to disclose Client's confidential information to a third party will be limited to a single occurrence tied to the specific

information disclosed to the specific third party, and the confidentiality clause will continue to be in effect for all other occurrences.

Upon termination of this Contract, OSDS will return to Client all records, notes, documentation and other items that were used, created, or controlled by OSDS during the term of this Contract.

5. INDEMNIFICATION. OSDS agrees to indemnify and hold Client harmless from all claims, losses, expenses, fees including attorney fees, costs, and judgments that may be asserted against Client that result from the acts or omissions of OSDS and/or OSDS's employees, agents, or representatives.

6. WARRANTY. OSDS shall provide its services and meet its obligations under this Contract in a timely and workmanlike manner, using knowledge and recommendations for performing the services which meet generally acceptable standards in OSDS's community and region, and will provide a standard of care equal to, or superior to, care used by service providers similar to OSDS on similar projects.

7. DEFAULT. The occurrence of any of the following shall constitute a material default under this Contract:

- a. The failure to make a required payment when due.
- b. The insolvency or bankruptcy of either party.
- c. The subjection of any of either party's property to any levy, seizure, general assignment for the benefit of creditors, application or sale for or by any creditor or government agency.
- d. The failure to make available or deliver the Services in the time and manner provided for in this Contract.

8. REMEDIES. In addition to any and all other rights a party may have available according to law, if a party defaults by failing to substantially perform any provision, term or condition of this Contract (including without limitation the failure to make a monetary payment when due), the other party may terminate the Contract by providing written notice to the defaulting party. This notice shall describe with sufficient detail the nature of the default. The party receiving such notice shall have 30 days from the effective date of such notice to cure the default(s). Unless waived in writing by a party providing notice, the failure to cure the default(s) within such time period shall result in the automatic termination of this Contract.

9. FORCE MAJEURE. If performance of this Contract or any obligation under this Contract is prevented, restricted, or interfered with by causes beyond either party's reasonable control ("Force Majeure"), and if the party unable to carry out its obligations gives the other party prompt written notice of such event, then the obligations of the

party invoking this provision shall be suspended to the extent necessary by such event. The term Force Majeure shall include, without limitation, acts of God, fire, explosion, vandalism, storm or other similar occurrence, orders or acts of military or civil authority, or by national emergencies, insurrections, riots, or wars, or strikes, lock-outs, work stoppages. The excused party shall use reasonable efforts under the circumstances to avoid or remove such causes of non-performance and shall proceed to perform with reasonable dispatch whenever such causes are removed or ceased. An act or omission shall be deemed within the reasonable control of a party if committed, omitted, or caused by such party, or its employees, officers, agents, or affiliates.

10. DISPUTE RESOLUTION. The parties will attempt to resolve any dispute out of or relating to this Agreement through friendly negotiations amongst the parties. If the matter is not resolved by negotiation, the parties will resolve the dispute using the below Alternative Dispute Resolution (ADR) procedure.

Any controversies or disputes arising out of or relating to this Agreement will be submitted to mediation in accordance with any statutory rules of mediation. If mediation does not successfully resolve the dispute, the parties may proceed to seek an alternative form of resolution in accordance with any other rights and remedies afforded to them by law.

11. ENTIRE AGREEMENT. This Contract contains the entire agreement of the parties, and there are no other promises or conditions in any other agreement whether oral or written concerning the subject matter of this Contract. This Contract supersedes any prior written or oral agreements between the parties.

12. SEVERABILITY. If any provision of this Contract will be held to be invalid or unenforceable for any reason, the remaining provisions will continue to be valid and enforceable. If a court finds that any provision of this Contract is invalid or unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision will be deemed to be written, construed, and enforced as so limited.

13. AMENDMENT. This Contract may be modified or amended in writing by mutual agreement between the parties, if the writing is signed by the party obligated under the amendment.

14. GOVERNING LAW. This Contract shall be construed in accordance with the laws of the State of North Carolina.

15. NOTICE. Any notice or communication required or permitted under this Contract shall be sufficiently given if delivered in person or by certified mail, return receipt requested, to the address set forth in the opening paragraph or to such other address as one party may have furnished to the other in writing.

16. WAIVER OF CONTRACTUAL RIGHT. The failure of either party to enforce any provision of this Contract shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Contract.

17. ATTORNEY'S FEES TO PREVAILING PARTY. In any action arising hereunder or any separate action pertaining to the validity of this Agreement, the prevailing party shall be awarded reasonable attorney's fees and costs, both in the trial court and on appeal.

18. CONSTRUCTION AND INTERPRETATION. The rule requiring construction or interpretation against the drafter is waived. The document shall be deemed as if it were drafted by both parties in a mutual effort.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed by their duly authorized representatives as of the date first above written. Cathy Hurt for Cherokee County DSS, and Kevin Smith for One Source Document Solutions, Inc., effective as of the date first above written.

Service Recipient:
Cherokee County DSS

By: _____
Cathy Hurt

Service Provider:
One Source Document Solutions, Inc.

By: _____
Kevin Smith

Attachment A – Rates and Fees

Part Number	Description	Units	Unit Price
OS-SC-SETUP	Project Setup Service	Each	\$250.00
OS-SC-BOXES	Boxes and Labels	Each	\$0.00
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.)	Per Hour	\$18.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization)	Per Hour	\$18.00
OS-SC-1-25	Document Scanning: (Up to 25,000 Total Images)	Per Image	\$0.10
OS-SC-25-50	Document Scanning: (25,000-50,000 Total Images)	Per Image	\$0.09
OS-SC-50	Document Scanning: (50,000 to 100,000 Total Images)	Per Image	\$0.07
OS-SC-100	Document Scanning: (100,000 to 500,000 Total Images)	Per Image	\$0.05
OS-SC-500	Document Scanning: (Over 500,000 Total Images)	Per Image	\$0.04
OS-SC-BK	Bound Book Scanning	Per Image	\$0.25
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	Per Keystroke	\$0.01
OS-SC-DB	Document Indexing: Database Lookup	Per Database	\$150.00
OS-SC-LGB	Large Format Scanning (Over 11x17): Black & White	Per Image	\$1.25
OS-SC-LGCL	Large Format Scanning (Over 11x17): Color	Per Image	\$2.50
OS-SC-AUD	Transfer Audio Files from Cassette or CD to Laserfiche	Per Tape/CD	\$10.00
OS-SC-VID	Transfer Video Files from CD or DVD to Laserfiche	Per CD/DVD	\$15.00
OS-FRT-MF	Scanning Freight - Mileage Fee (one way)	Per Mile	\$1.75
OS-FRT-BX	Scanning Freight - Box Handling Fee	Per Box	\$1.00
OS-SC-SHRED	Shredding Services – Standard Box	Per Box	\$5.50
OS-SC-STOR-P	Document Storage at One Source Facility – Per Pallet	Per Month	\$40.00

Attachment B – Policies and Procedures

Our Quality Control process starts from the moment the boxes are picked up at your site. We log, double check the inventory sheets provided and verify all records have been received. At each stage of the project, the next stage is double checking and verifying the work of the previous stage. A sample box is completed for approval at the onset of the project to determine accurate communication on project requirements.

1. During the prepping stage, files are counted and verified to the log sheet provided with each box, dividers are inserted (if desired) and all operations required in preparing the files are completed, such as removing staples, flattening turned corners, removing or replacing sticky notes, etc.
2. During the scanning stage, technicians are charged with verification of scanning all pages within the file in the order they reside, at the best quality available at 300 dpi and stored in a Group IV TIFF format as required by the NC State Archives. All scanners are equipped with the latest image enhancement settings to assure high-quality scans and double-feed detection.
3. During the Quality Control stage, technicians are checking each image for readability, proper orientation, blank page removal and re-scanning if necessary.
4. All files are then run through the post-processing stage for indexing (double key validation) and breaking documents into the required structure.
5. Upon completion the files are reviewed for accuracy, compared once again to the inventory control sheets assuring all files were scanned and divided as necessary.
6. Files are reviewed one more time for accuracy by the supervisor before exporting the files in the proper format for delivery via DVD or secure ftp.
7. All technicians working on the files initial and document the date and time they spent on each task. If a question arises, we review it with the appropriate personnel.
8. As deliveries are made, we verify that the delivery coincides with the data received for that pickup indicating box numbers, number of documents and images completed.
9. All paper files are kept in a secure warehouse adjoining the service bureau with limited access until they are moved to an off-site long-term storage facility or shredded.
10. Data is kept in our secure data center and backed up daily. Once a project is completed, the data is purged from our system. We do offer to keep a backup for our clients should that be desired.
11. If paper files in our warehouse are to be shredded and we receive written approval to do so, we have a certified shredding company come to our facility and we monitor the entire process, documenting that all documents/papers were properly disposed of. Upon completion of the on-site shredding, the truck returns to its plant where the shredded paper is run through an additional shredding operation. A certificate of disposal is provided to you upon completion.
12. Files that need extended storage are inventoried, palletized, shrink-wrapped, and transported to our partner's secure facility for the duration of storage cycle.
13. All boxes will be taped with tamper-evident tape prior to leaving your facility to add additional security to the boxes to assure they remain intact in transit.
14. Document accessibility – One Source will provide 1-2 hour accessibility, depending on file size, to the emergency requests for the first 100 file pulls at no additional charge. We prep, scan and index files then upload to our ftp server for your access, and will email confirmation to the file requestor or IT. Files 101 & beyond will carry a service fee of \$25 per file.

Fax requests incur a service fee of \$10. Full accessibility to physical records in storage at One Source by designated personnel is available by appointment only, upon request.

Attachment A – Rates and Fees

Part Number	Description	Units	Unit Price
OS-SC-SETUP	Project Setup Service	Each	\$250.00
OS-SC-BOXES	Boxes and Labels	Each	\$0.00
OS-SC-PREP	Document Preparation (Staple Removal, Purging etc.)	Per Hour	\$18.00
OS-SC-REAS	Document Reassembly (Returning Documents to Original Folders, Organization)	Per Hour	\$18.00
OS-SC-1-25	Document Scanning: (Up to 25,000 Total Images)	Per Image	\$0.10
OS-SC-25-50	Document Scanning: (25,000-50,000 Total Images)	Per Image	\$0.09
OS-SC-50	Document Scanning: (50,000 to 100,000 Total Images)	Per Image	\$0.07
OS-SC-100	Document Scanning: (100,000 to 500,000 Total Images)	Per Image	\$0.05
OS-SC-500	Document Scanning: (Over 500,000 Total Images)	Per Image	\$0.04
OS-SC-BK	Bound Book Scanning	Per Image	\$0.25
OS-SC-INDEX	Document Indexing: Manual Data-Entry (Per Keystroke)	Per Keystroke	\$0.01
OS-SC-DB	Document Indexing: Database Lookup	Per Database	\$150.00
OS-SC-LGB	Large Format Scanning (Over 11x17): Black & White	Per Image	\$1.25
OS-SC-LGCL	Large Format Scanning (Over 11x17): Color	Per Image	\$2.50
OS-SC-AUD	Transfer Audio Files from Cassette or CD to Laserfiche	Per Tape/CD	\$10.00
OS-SC-VID	Transfer Video Files from CD or DVD to Laserfiche	Per CD/DVD	\$15.00
OS-FRT-MF	Scanning Freight - Mileage Fee (one way)	Per Mile	\$1.75
OS-FRT-BX	Scanning Freight - Box Handling Fee	Per Box	\$1.00
OS-SC-SHRED	Shredding Services – Standard Box	Per Box	\$5.50
OS-SC-STOR-P	Document Storage at One Source Facility – Per Pallet	Per Month	\$40.00

Attachment B – Policies and Procedures

Our Quality Control process starts from the moment the boxes are picked up at your site. We log, double check the inventory sheets provided and verify all records have been received. At each stage of the project, the next stage is double checking and verifying the work of the previous stage. A sample box is completed for approval at the onset of the project to determine accurate communication on project requirements.

1. During the prepping stage, files are counted and verified to the log sheet provided with each box, dividers are inserted (if desired) and all operations required in preparing the files are completed, such as removing staples, flattening turned corners, removing or replacing sticky notes, etc.
2. During the scanning stage, technicians are charged with verification of scanning all pages within the file in the order they reside, at the best quality available at 300 dpi and stored in a Group IV TIFF format as required by the NC State Archives. All scanners are equipped with the latest image enhancement settings to assure high-quality scans and double-feed detection.
3. During the Quality Control stage, technicians are checking each image for readability, proper orientation, blank page removal and re-scanning if necessary.
4. All files are then run through the post-processing stage for indexing (double key validation) and breaking documents into the required structure.
5. Upon completion the files are reviewed for accuracy, compared once again to the inventory control sheets assuring all files were scanned and divided as necessary.
6. Files are reviewed one more time for accuracy by the supervisor before exporting the files in the proper format for delivery via DVD or secure ftp.
7. All technicians working on the files initial and document the date and time they spent on each task. If a question arises, we review it with the appropriate personnel.
8. As deliveries are made, we verify that the delivery coincides with the data received for that pickup indicating box numbers, number of documents and images completed.
9. All paper files are kept in a secure warehouse adjoining the service bureau with limited access until they are moved to an off-site long-term storage facility or shredded.
10. Data is kept in our secure data center and backed up daily. Once a project is completed, the data is purged from our system. We do offer to keep a backup for our clients should that be desired.
11. If paper files in our warehouse are to be shredded and we receive written approval to do so, we have a certified shredding company come to our facility and we monitor the entire process, documenting that all documents/papers were properly disposed of. Upon completion of the on-site shredding, the truck returns to its plant where the shredded paper is run through an additional shredding operation. A certificate of disposal is provided to you upon completion.
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BILL

Page 1 of 2

1900189-00

VENDOR

SHIP TO

5300
SOCIAL SERVICES
4800 WEST US HWY 64
MURPHY, NC 28906

\$12,000.00

Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Sent: Friday, July 06, 2018 2:40 PM
To: Stancil, Cindy
Cc: Kay Fields
Subject: RE: shred it.

Cindy,

That sounds like a plan. I will be on vacation, lucky me to miss all that fun. So, if you would email Kay Fields our Interim Director at kay.fields@cherokeeconomy-nc.gov and let her know the arrival time of the truck on the 18th she can coordinate with those who will be helping with filling the purge containers.

Thank you,
Cathy

From: Stancil, Cindy [mailto:CStancil@STERICYCLE.com]
Sent: Friday, July 06, 2018 1:50 PM
To: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Subject: RE: shred it.

Hi Cathy,

Sorry to say we are booked next week due to holiday rerouting, we can be there 7/18/18 will that work?

From: Cathy Hurt [mailto:cathy.hurt@cherokeeconomy-nc.gov]
Sent: Friday, July 06, 2018 1:32 PM
To: Stancil, Cindy <CStancil@STERICYCLE.com>
Subject: RE: shred it.

Hey Cindy,



How about Wed/July 11, or Thurs/July 12 would be great. We have been approved for 30/ 64 gal containers. We have 7 containers on site that are full and are on the rotation list for Shred It to be picked up on this Monday July9. Don't see the need for that pick up if you are sending a truck later on in the week, do you? Let me know. Thank you Cathy

From: Stancil, Cindy [mailto:CStancil@STERICYCLE.com]
Sent: Friday, July 06, 2018 11:02 AM
To: Cathy Hurt <cathy.hurt@cherokeeconomy-nc.gov>
Cc: Morgan, William <William.Morgan@STERICYCLE.com>
Subject: shred it.

Hi Cathy,

Just wanted to check in and get a little more info on our purge pick up. Do you have a week/ date you are wanting us there and approx. how many containers do you think you will have for pickup.

Cindy Stancil
Dispatch
3101 Williams St. Chattanooga, TN 37410

  Shred-it® is a Stericycle solution.

Amanda McGee

From: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Sent: Friday, July 06, 2018 2:46 PM
To: Kay Fields
Subject: FW: shred it.

It appears we have a PURGE DATE.. July 18th... I will recruit you some helpers for that day as I will be on the beach...
Cathy

From: Stancil, Cindy [mailto:CStancil@STERICYCLE.com]
Sent: Friday, July 06, 2018 2:42 PM
To: Cathy Hurt <cathy.hurt@cherokeecounty-nc.gov>
Subject: RE: shred it.

Will do, have a great vacation.

From: Cathy Hurt [mailto:cathy.hurt@cherokeecounty-nc.gov]
Sent: Friday, July 06, 2018 2:40 PM
To: Stancil, Cindy <CStancil@STERICYCLE.com>
Cc: Kay Fields <kay.fields@cherokeecounty-nc.gov>
Subject: RE: shred it.

Cindy,
That sounds like a plan. I will be on vacation, lucky me to miss all that fun. So, if you would email Kay Fields our Interim Director at kay.fields@cherokeecounty-nc.gov and let her know the arrival time of the truck on the 18th she can coordinate with those who will be helping with filling the purge containers.

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Cindy Stancil
Dispatch
3101 Williams St. Chattanooga, TN 37410

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Amanda McGee

From: Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Sent: Tuesday, July 10, 2018 3:15 PM
To: Graham, Kathi R
Cc: Bebeie McClure; Cathy Hurt
Subject: RE: [External] RE: Retention Schedule

Thanks. This is great news!!!

From: Graham, Kathi R [mailto:kathi.graham@dhhs.nc.gov]
Sent: Tuesday, July 10, 2018 2:54 PM
To: Kay Fields <kay.fields@cherokeeconomy-nc.gov>
Subject: RE: [External] RE: Retention Schedule

Good Afternoon,

There is no reason to keep the paper record once all the information has been scanned. Some counties choose to retain some information in paper form, but that is an agency call.

Please let me know if you have any other questions.

Kathi Graham

Adult Programs Representative
Division of Aging and Adult Services
NC Department of Health and Human Services

919-609-1966 office
828-251-1844 fax
Kathi.Graham@dhhs.nc.gov

693 Palmer Drive
2101 Mail Service Center
Raleigh, NC 27699-2101

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From: Kay Fields [mailto:kay.fields@cherokeeconomy-nc.gov]
Sent: Monday, July 09, 2018 5:23 PM
To: Graham, Kathi R <kathi.graham@dhhs.nc.gov>
Subject: [External] RE: Retention Schedule

CAUTION: External email. Do not click links or open attachments unless verified. Send all suspicious email as an attachment to ReportSpam.

Please advise why keep any of this after it has been scanned?

From: Graham, Kathi R [mailto:kathi.graham@dhhs.nc.gov]
Sent: Monday, July 02, 2018 4:07 PM

To: Kay Fields <kay.fields@cherokeeconomy-nc.gov>

Cc: Massey-smith, Joyce <joyce.massey-smith@dhhs.nc.gov>

Subject: Retention Schedule

Good Afternoon,

Here is the link to the 3 page PDF that that I mentioned in the VM I left you. It explains the retention schedule and includes a link to the retention schedule.

<https://www2.ncdhhs.gov/control/retention/2017/recordback17.pdf>

SSBG funded services can be purged after 7 years, although guidance has been to keep guardianship records.

MAC records follow Medicaid guidelines.

Often kept: the 5027, face sheet, case closing transfer summary and anything court related, birth certificates, SS cards in a separate filing cabinet labeled purged records.

I hope this information is helpful.

Kathi Graham

Adult Programs Representative

Division of Aging and Adult Services

NC Department of Health and Human Services

919-609-1966 office

828-251-1844 fax

Kathi.Graham@dhhs.nc.gov

693 Palmer Drive

2101 Mail Service Center

Raleigh, NC 27699-2101

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